**Financial Goals Worksheet**

|  |  |  |  |
| --- | --- | --- | --- |
| Short-Term Goals(Under 12 months)  | Estimated Cost | Target Date | Amount to Save Monthly |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  |  | TOTAL to Save: $  |

|  |  |  |  |
| --- | --- | --- | --- |
| Medium-Term Goals(One to three years)  | Estimated Cost | Target Date | Amount to Save Monthly |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  |  | TOTAL to Save: $  |

|  |  |  |  |
| --- | --- | --- | --- |
| Long- Term Goals (Over three years)  | Estimated Cost | Target Date | Amount to Save Monthly |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  |  | TOTAL to Save: $  |